

## Willing & Able

We have created a New Feature giving you the ability to control the willing & able process.

### EASIER to USE MY BIZ – Willing & Able Process

#### What changes have been made?

- The aim of this is to speed up the process and put you in control
- Once you have submitted your ARF, AMRF or PRB application a new tab will appear in the 'Outstanding Requirements' section of your MyBiz pipeline
- Complete a simple online form
- An email will automatically generate to the correct address based on the choice of life company which attaches the W&A letter
- A history of requests is also available to allow easy tracking

#### Features

This feature is available on the following products:

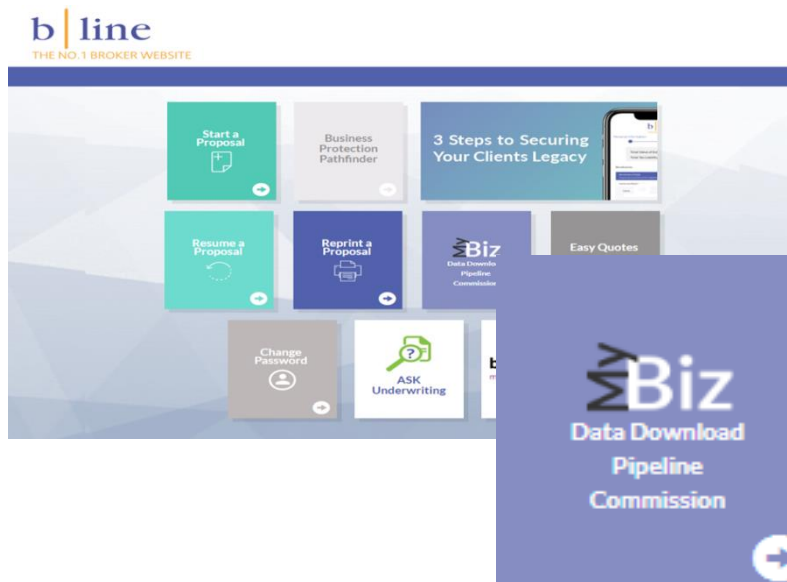
- Personal Pension
- PRB
- ARF
- AMRF

This feature is not available on Company Pensions or PRSA's.

#### Let's get started!

This guide will bring you step by step through the willing & able functionality.

#### Enter My Biz as normal



To start the willing and able process select **Proposal Requirements**.

**Proposal Requirements**

Requirements | **Willing & Able Request**

**Willing & Able Request Data**

Customer Name: Mr

Receiving Plan Type: Personal Pension

Transferring Plan Type: Personal Pension

Transferring Life Office: Acorn Life

Transferring Plan Reference Number:

Life Office Contact Email: pensionadmin@acornlife.ie

Copy To:

**Submit**

**Important Requirement Information**

1. Please do not use this functionality for internal claims. If transferring from a retail plan to another retail plan please email requirements to pensionsica@irishlife.ie. If unsure please contact any member of the Platform team.

**Willing & Able Request History**

Action	Receiving Plan Type	Transferring Plan Type	Transferring Life Office	Plan Reference Number	Contact Email	Issued Date
	Personal Pension	Personal Pension	Bank of Ireland	zzzzzz99999	@irishlife.ie	31/08/2018 12:40
	Personal Pension	Personal Pension	Acorn Life	1231	@irishlife.ie	30/08/2018 16:40

First Previous 1 Next Last Show 10 entries Showing 1 to 2 of 2 entries

Complete a simple online form by answering:

- Select the transferring plan type from a drop down list
- Choose the relevant life company / provider
- Inputting the transferring policy number

## Proposal Requirements

**Proposal Requirements**

Requirements | **Willing & Able Request**

**Willing & Able Request Data**

Customer Name: Mr

Receiving Plan Type: Personal Pension

Transferring Plan Type: Personal Pension

Transferring Life Office: **Acorn Life**

Transferring Plan Reference Number:

Life Office Contact Email:

Copy To:

**Important Requirement Information**

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**Willing & Able Request History**

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First Previous 1 Next Last Show 10 entries Showing 1 to 2 of 2 entries

An email from the Irish Life Pensions Team will automatically generate to the correct mailbox in the chosen life company/provider, attaching the W&A letter and any other relevant documentation needed (eg PAO form).

## Willing & Able

testretailit@irishlife.ie

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Tue 04/09/2018 10:21

To:

Message Personal To Personal Letter.pdf (55 KB) Personal to Personal Additional Info.pdf (226 KB)

Hi,

Please find attached confirmation we are willing and able to accept a transfer value as requested by our mutual customer.

All the details of the transfer are included within the letter.

We have also attached an Additional Info form and would appreciate if you could provide us with this information also.

If you have any questions please do not hesitate to contact us.

Regards,

Irish Life

Pensions New Business Team



You can choose to blind copy yourself on the email

**Proposal Requirements**

**Willing & Able Request**

Willing & Able Request Data

Transferring Plan Reference Number: 1234

Life Office Contact Email: [Redacted]

Copy To: [Redacted]

**Email Sent!**

An email has been successfully sent!

**Submit**

**Requirement Information**

Please use this functionality for internal transfers from a retail plan to another retail plan please email pensionsict@irishlife.ie. If unsure please contact any member of the Platform team.

You will get clear confirmation the email has been sent

A history of requests is available for you to view to allow easy tracking

Willing & Able Request History						
Search: <input type="text"/>						
Action	Receiving Plan Type	Transferring Plan Type	Transferring Life Office	Plan Reference Number	Contact Email	Issued Date
	Personal Pension	Personal Pension	Bank of Ireland	zzzzzz99999		31/08/2018 12:40
	Personal Pension	Personal Pension	Acorn Life	1231		30/08/2018 16:40
First Previous 1 Next Last Show 10 entries						



Report shows 10 per page as a default - this can be expanded. There can also be more than one page

Showing 1 to 2 of 2 entries

## Sample Documents

Below is a sample of the letter & PAO document that will be attached to the email.



Lower Abbey Street  
Dublin 1, Ireland  
Telephone 01 704 2000  
Fax 01 704 1900  
[www.irishlife.ie](http://www.irishlife.ie)

**Private & Confidential**

A  
S  
G  
C

07/06/2018

Irish Life No:  
Your Ref No: TEST  
Client: Ms

Dear Sir or Madam,

I can confirm that the above Irish Life plan is a Personal Retirement Bond.

This plan is capable of accepting a transfer value from the Company Pension for Ms

Please provide details of the Employer, Employee and AVC split and confirm if a Pensions Adjustment Order has been granted on this plan. Also please advise if the rules of the scheme allow the member to avail of AMRF /ARF options.

Irish Life Requirements - we will require the following attached forms to be completed if a PAO has been granted

- Additional information if PAO form

Or

- Confirmation of details requested within the above forms to be completed and returned to Irish Life

All transfer payments by cheque should be made payable to Irish Life Assurance, with plan number, 11902611, referenced on your attaching correspondence

Alternatively, if you would like to pay the transfer value by EFT all the instructions you will need to make your payment can be found on the Irish Life website. From the Home page just go to the Help Centre and you will find the instructions on "Making a Payment to Irish Life by Electronic Fund Transfer" within the Billing area of the Help Centre. Due to a change in our security and data protection policy we can no longer confirm our EFT details on our willing and able letters.

Please email [Pensionsnewbusiness@irishlife.ie](mailto:Pensionsnewbusiness@irishlife.ie) to confirm when the payment has been made.

If you have any questions or need further help, please contact the Irish Life Customer Service Team at [customerservice@irishlife.ie](mailto:customerservice@irishlife.ie) or on 01 704 1010, lines open Monday to Thursday 8am to 8pm, Friday 10am to 6pm, Saturday 9am to 1pm. In the interest of Customer Service we will record and monitor calls.

Yours sincerely,

Sé Weston  
Executive Manager - Customer Service

## Sample Additional Information

If pension adjustment order is in place the system will attached the relevant form as per below.



### Additional Information if Pension Adjustment Order Granted

Pensions New Business  
Irish Life Assurance plc  
Lower Abbey Street  
Dublin 1

Client Name

Transferring Plan

Client Date of Birth  /  /

Irish Life Reference Number

Has a Pension Adjustment Order (PAO) granting part of the benefits to the member's spouse been made on the benefits under the existing pension arrangement, or on any pension arrangement from which the transferring arrangement received a transfer? or

Yes ☐ No ☐

Does this transfer represent a non-member spouse's designated benefit granted under a PAO?

Yes ☐ No ☐

If yes to either question a court certified copy of the PAO is needed and we require the additional information below.

#### Where transfer contains member's benefit only

##### Non-member spouse's details

- Name:
- Address:
- PPSN (if known):

##### **Where member's benefit is transferring to an occupational pension scheme or buy out bond:**

Please confirm the non-member's retirement lump sum entitlement (under salary & service route) at date non-member's designated benefit was transferred out: €

##### Where was non-member spouse's benefit transferred to?

- Type of arrangement
- Name and address of provider